



The Monthly Retainer Model in Financial Planning: What It Is, Why It Works, and How to Implement It in Your Firm

By Alan Moore, Michael Kitces

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The financial advice industry is changing. The Monthly Retainer Model in Financial Planning introduces a new way for advisors to structure their business models, making it feasible to profitably serve the next generation of clients for years to come. Alan Moore and Michael Kitces explain how the monthly retainer model enables RIA owners to work with Gen X and Gen Y clients, and share how to create and establish this fee structure in your own business. They also walk through how to design the model that works for the exact type of client you want to serve, transition away from your old fee structure to the new model, communicate your value to prospects and current clients, and leverage technology to deliver your services efficiently. This is THE guide you need to design, implement, and run a monthly retainer so you can generate business revenue and successfully work with the next generation of financial planning clients.

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